If you plan to write your Technology Plan, please use this document for guidance:
Technology Plan Guidelines for Missouri Public Libraries 2010-2013
Missouri State Library

As part of the e-rate application process, the Federal Communications Commission (FCC) requires public libraries in Missouri to submit a new technology plan for review to the Missouri State Library every three years and to update it annually. To meet FCC guidelines and to provide us with a succinct view of your library, your technology plan must contain the following: **Required Forms**

You must submit the **Technology Plan Update and Certification of Compliance forms** with your new technology plan. These are available at http://www.sos.mo.gov/library/certifications/schedule_due.asp.

Plan Elements Use the information and considerations listed under each element to guide your responses.

1. **Heading Information:** Library Name, Contact Person, Dates Covered in the Plan, and Date Written (and Revised, If Applicable)

   a. **Library Name:** Indicate the library or library system for which the plan is written. Include the address of the library's headquarters.

   b. **Contact Information:** Provide contact information for the person to whom questions should be directed.

   c. **Dates Covered in the Plan:** Typically, this will be 2010-2013 which indicates your plan covers July 1, 2010 to June 30, 2013.

   d. **Creation Date:** Indicate when you first started drafting your new plan. Note, the first draft of your Technology Plan for 2010 to 2013 must be written before either you *or* MOREnet files Form 470 for Year 2010. MOREnet typically files its first Form 470 on behalf of the REAL program in December, so it is best if you begin the draft of your 2010-2013 plan *before* November 30, 2010.

   e. **Revision Dates:** If you are revising your plan during the three-year period, include *both* the original month, day, and year the plan was written *and* the month, day, and year of the revision.

2. **Library's Mission Statement**
   Include your library's mission statement.

3. **Demographics of the Public Library System or Public Library (Not Mandatory)**

   The purpose of this criterion is to provide some information relating to the size of the public library service area and identify demographic factors that may impact the direction of the technology plan. Demographics based on the 2000 census for each public library district are available at Missouri Library Districts: 100 percent count data from Census 2000 listed at http://www.sos.mo.gov/library/demographics.asp.

   a. Are there specific challenges in terms of service delivery that you face because of your location or size?

   b. Have there been significant changes in the demographics of your public library system or public library customers within the last three years? If so, describe these changes.

   c. Are there specific challenges in terms of service delivery that you face because of the changes in the demographics of your public library system or public library customers?

4. **Identify Your Technology Planning Team (Not Mandatory)** Identify the individuals involved in technology planning and the reason they are involved in the process.

5. **Identify Your Technology Vision, Goals, and Strategies** Establishing a vision, goals, and strategies for technology to maintain or improve delivery of public library services are the foundational elements of the technology plan, should be based on the results of the needs assessment and include activities for all three years of the plan.

   a. What programs or services will your library seek to maintain in the upcoming three years?

   b. What programs or services will your library seek to improve in the upcoming three years?

   c. What programs or services will your library seek to add in the upcoming three years?

   d. What steps will you take to bring your plans to fruition?

6. **Staff Training** Describe your plans for training library staff in effective use of technology to support library service goals. Be sure to include your budget for related professional development costs in item 9.

   a. What knowledge and skills are needed for staff to effectively use and maintain telecommunications and information technologies used in delivering library services?

   b. Who is in charge of coordinating professional development activities?

   c. How will staff receive necessary training? Identify training resources you will use.

7. **Technology Assessment** Describe your basic technology infrastructure.

   a. What is your broadband connectivity?

   b. Describe your network's configuration, any filtering tools used, and frequency of updates.

   c. Complete a hardware and software inventory for your library system and attach it to your Technology Plan. You may group similar items. Indicate operating systems for your workstations.

   d. Include your library automation system.

   Other Considerations:

   Do you offer wireless access to the Internet?

   How are assistive technologies provided and supported?

8. **Needs Assessment** Conducting a needs assessment involves identifying the technology needs of both the organization and its stakeholders.

   a. How do you determine when equipment is approaching obsolescence? Do you have an equipment replacement schedule? If so, please describe the basic schedule. If not, what criteria do you use?

   b. How do you determine the technology needs of the staff?

   c. How do you identify the technology needs of the community?

9. Budget
This criterion is designed for the public library to show that an estimated operating budget has been planned and exists for the course of the three-year technology plan. To the extent possible, identify existing and potential funding sources, and create a budget summary of projected expenditures for the next three years. If not already present, include separate Page 3
estimates for expenditures on hardware, software, consulting contracts, telecommunications services, staff, training for technical staff and staff development.

10. Implementation Plan The implementation plan should include basic schedules and timelines, budget commitments, equipment to be purchased, specific trainings to be pursued, communications strategies associated with the technology plan, action steps for tasks to be completed, periodic evaluation of progress with implementation of the plan, milestones to be reached, staff assignments, and time estimates for tasks. The timeline that should be reflected in the implementation plan is July 1, 2010 to June 30, 2013. If you prefer, you may incorporate this piece of information into Element 5, the Technology Vision, Goals and Strategies.

11. Evaluation Technology plans submitted must incorporate an evaluation strategy for the plan. Evaluation and outcome measurement are an integral part of technology planning and are essential to successful implementation. Progress should be measured at least annually.

a. How will the library evaluate the effectiveness of technology in accomplishing its service goals?

b. How will the library monitor and document progress in meeting the objectives of this plan?

c. In addition to measuring services, consider how and when the evaluation will be used to update and modify your plan. Who is responsible for updating the plan?

Please note technology planning is an ongoing process. The planning cycle includes:
Planning Cycle Diagram: Technology Made Simple, page 60. **Mail your Technology Plan to:** Jean Morrison, Library Consultant, Technology Missouri State Library 600 West Main Street, P.O. Box 387 Jefferson City MO 65102-0387 **Plans should be submitted no later than March 31, 2010**.

Prepare
Establish Team
Assess
Educate

Plan
Analyze Data and Options
Define Mission and Vision
Set Goals and Action Steps
Create Detailed Plan

Execute
Implement
Train
Market
Develop Policies

Evaluate
Measure Results
Make Adjustments Page 4

Adapted from

Minnesota Department of Education. *2008-2011 Technology Planning Guide for Minnesota School Districts, Charter Schools, Nonpublic Schools, and Public Libraries: 2008-20011 Planning Cycle.* Accessed at **http://education.state.mn.us/mde/static/003528.pdf.**

State Library of North Carolina. *Technology Planning Instructions for Universal Service (E-Rate) Discount Eligibility: July 1, 2007 – June 30, 2010.* Accessed at **http://statelibrary.dcr.state.nc.us/hottopic/techplan/tplan07.doc**

Universal Service Administrative Company. *Develop a Technology Plan.* Accessed at **http://www.usac.org/sl/applicants/step02/. Resources** Bolan, Kimberly and Robert Cullin. *Technology Made Simple: An Improvement Guide for Small and Medium Libraries.* Chicago: American Library Association, 2007.

Minnesota Department of Education. *2008-2011 Technology Planning Guide for Minnesota School Districts, Charter Schools, Nonpublic Schools, and Public Libraries: 2008-2011 Planning Cycle.* Accessed at **http://education.state.mn.us/mde/static/003528.pdf.**

State Library of North Carolina. *Technology Planning Instructions for Universal Service (E-Rate) Discount Eligibility: July 1, 2007 – June 30, 2010.* Accessed at **http://statelibrary.dcr.state.nc.us/hottopic/techplan/tplan07.doc**

Universal Service Administrative Company. *Develop a Technology Plan.* Accessed at **http://www.usac.org/sl/applicants/step02/.**

WebJunction. *TechAtlas.* Accessed at **http://www.webjunction.org/do/Navigation?category=13408.**

WebJunction. *WebJunction Pathfinder: Technology Planning.* Accessed at **http://www.webjunction.org/do/DisplayContent?id=12028.**